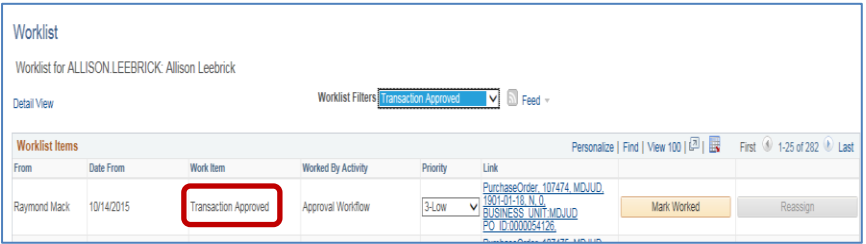


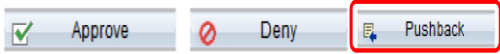
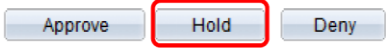
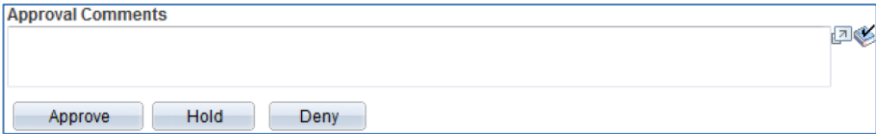
LAST REVISED DATE: 02/03/2020

General Information

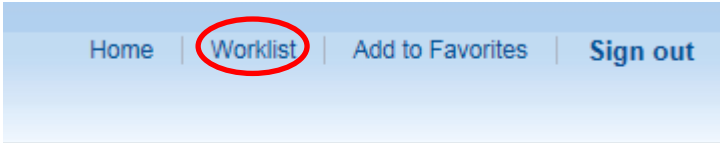
Task	Process Information
Understanding Workflow and Using the Worklist for Asset Management PO Approvers	<p>Workflow provides a means to automate business authorization processes so they can be applied throughout the Maryland Judiciary. When you submit a transaction for approval, the action triggers workflow notifications to inform the designated recipient(s) to take appropriate action (approve, deny, or push-back the transaction as an approver). These notifications trigger emails and new action items in the approver's GEARs Worklist. GEARs captures and maintains the date, time, user ID, and nature of the event that takes place each time someone completes a workflow action.</p> <p>When there is work that requires your approval or there is a notification that something has occurred, an automatic process puts the item in your Worklist.</p> <p>A link to your Worklist appears at the top of each page to alert you to any outstanding workflow items that require your attention. From the Worklist, you can access item details, complete the required actions, and mark the items as complete.</p> <p>Although the majority of these Worklist items generate an email notification, it is a good idea to get in the habit of checking your Worklist regularly.</p>

Things to Know About Core Workflow Functionality and Concepts in GEARs.

<p>Approve</p> <p>Approve Hold Deny</p> <p>NOTE: Please refer to the Approval Levels and Dollar Thresholds document for more information about the Judiciary's approval levels for each type of transaction.</p>	 <p>Approval action routes an email and Worklist item notification back to the originator of the PO/Express PO (i.e., Field/Procurement buyer - after all approvers have approved).</p> <p>(NOTE: The Field Buyer also receives a notice when a PO has been dispatched by Procurement.)</p>
<p>Deny</p> <p>Approve Hold Deny</p>	<p>Denial action stops the workflow and routes an email and Worklist item notification to the originator of the transaction.</p> <p>PO/Express PO routes to the Field/Procurement buyer (PO originator). Denied POs can be corrected by pulling up the existing PO, making modifications, and re-submitting. If a denied PO was deemed no longer needed, it will need to be cancelled (i.e., not re-submitted for approval).</p>

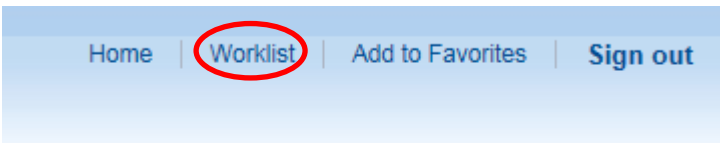
<p>Push-back</p> 	<p>An approver can Push-back the transaction to the previous approval step. The purpose of a Push-Back is to question the prior step's approval action and/or to request clarification from the prior approver. Push-Back only applies when a transaction has been approved by at least one person (when there is a predecessor approval step).</p> <p>When a Push-Back has been received (by the previous approver), s/he must take appropriate action (e.g., add missing data, provide justification, attach additional documentation, etc.).</p>
<p>Hold</p> 	<p>PO approvers can also click the Hold action button to prevent the approval process from progressing to the next approval step until the (current) approver takes action on the purchase order. The approval 'Hold' action is removed when the (current) approver moves it forward by doing any of the following: Request the buyer to update the PO and re-trigger the approval process, Approve, or Deny. While the "hold" is still a viable option, we caution users in opting for this selection. As mentioned, no further action happens on the document until the approver moves forward with action. Therefore, the user must remember that the document was placed on hold and take required action.</p>
<p>Comments</p>	 <p>Comments may be inserted when performing an Approval (and in some cases, when submitting for Approval) and can be viewed by users that have security access to view the transactions. Comments are required for the following actions: Deny, Hold, or Push-Back.</p>

GEARS Navigation

<p>You can find your Worklist in the upper right-hand corner of your GEARS (PeopleSoft Financials) Screen.</p>	 <p style="text-align: right;">Personalize Page</p>
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1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	Click the "Worklist" link.	 <p style="text-align: right;">Personalize Page</p>

2. Use the **Worklist** page to view, assign priority to, and process Worklist items.

Worklist

Worklist for FREDERICKA JONES: Fredericka Jones

Worklist Filters: Approval Routing Feed

From	Date From	Work Item	Worked By Activity	Priority	Link	Personalize	Find	View All	First	1-11 of 11	Last
Fredericka Jones	03/11/2019	Approval Routing	Approval Workflow		AMCInvoice 46 SHARP 2019-03-11 N DATE SUBMITTED 2019-03-11 11:11:11 STAMP 2019-03-11 11:11:11				Mark Worked	Reassign	
Fredericka Jones	03/12/2019	Approval Routing	Approval Workflow		AMCInvoice 46 SHARP 2019-03-12 N DATE SUBMITTED 2019-03-12 11:11:11 STAMP 2019-03-12 11:11:11				Mark Worked	Reassign	
Robin Smith	04/02/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder 178468 MOJUD 2019-03-14 N BUSINESS UNIT MOJUD PO ID 00000000000000000000				Mark Worked	Reassign	
William - OIM Support	04/10/2019	Approval Routing	Approval Workflow		AMCInvoice 46 SHARP 2019-03-12 N DATE SUBMITTED 2019-03-12 11:11:11 STAMP 2019-03-12 11:11:11				Mark Worked	Reassign	
William - OIM Support	04/11/2019	Approval Routing	Approval Workflow		AMCInvoice 46 SHARP 2019-03-13 N DATE SUBMITTED 2019-03-13 11:11:11 STAMP 2019-03-13 11:11:11				Mark Worked	Reassign	
Robin Smith	05/01/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder 178538 MOJUD 2019-03-14 N BUSINESS UNIT MOJUD PO ID 00000000000000000000				Mark Worked	Reassign	
Robin Smith	10/09/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder 178538 MOJUD 2019-03-14 N BUSINESS UNIT MOJUD PO ID 00000000000000000000				Mark Worked	Reassign	
Robin Smith	10/16/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder 178538 MOJUD 2019-03-14 N BUSINESS UNIT MOJUD PO ID 00000000000000000000				Mark Worked	Reassign	
Robin Smith	10/16/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder 178640 MOJUD 2019-03-14 N BUSINESS UNIT MOJUD PO ID 00000000000000000000				Mark Worked	Reassign	
Kevin Jones	10/16/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder 178641 MOJUD 2019-03-14 N BUSINESS UNIT MOJUD PO ID 00000000000000000000				Mark Worked	Reassign	
Colleen Cantler	10/17/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder 178648 MOJUD 2019-03-14 N BUSINESS UNIT MOJUD PO ID 00000000000000000000				Mark Worked	Reassign	

Worklist Filters

Worklist Filters is a way to limit your displayed items to a specific type of work item like **“Approval Routing”**, **“Approval Review Routing”**, or **“Transaction Approved”**.

From

Displays the individual who triggered the work item.

Date From

Displays the date when the work item was triggered.

Work Item

Displays the type of work: (1) **Transaction Approved**, (2) **Approval Review Routing**, or (3) **Approval Routing**. **Transaction Approved** means that the transaction was approved by someone else in your group and you are being notified that the transaction has been approved. **Approval Review Routing** means that a review is required for the transaction. Lastly, **Approval Routing** means that an approval is required for the transaction. **NOTE:** The type of work items will depend on your role.

Worked By Activity

Displays the action that generated the workflow item, such as **Approval Workflow**.

Priority

Work Item defaults to (1- High, 2- Medium, 3- Low) priority. **NOTE:** Priority setting defaults are displayed on a user's **Worklist**. The priority setting can be changed by the user for his/her own use in filtering and will only impact this user's **Worklist**. This user's updated priority setting does not move to the next approver/reviewer in the Workflow chain (he/she will see the system default priority setting on the WL page).

Link

Click a link in this column to access the target page—the page where you work on the item. The target page is specific to the type of activity that you perform. For example, if the action is Purchase Order Approval, the link accesses the Purchase Order Approval page where you can view information about the Purchase Order. **NOTE:** If the color of the link is **red**, you have clicked the link and have viewed the transaction (at least once before) but did not complete the required action. If the color of the link is **blue**, the transaction is new and has not been previously accessed.

		<div><div>Marked Worked</div><div>Click this button to mark an item as worked if you or another approver has already performed the necessary actions. This indicates that no immediate system action(s) is required and simply removes the item from your worklist.</div></div> <div>NOTE: You can use the grid features to order (sort) columns</div>																								
3.	<div><div>If the work item requires approval, the Work Item column will contain “Approval Routing”. Click on the link to access the Approval page.</div><div>In this example, a Purchase Order (PO) is used to demonstrate the approval work item steps.</div></div>	<div><div><div>Worklist Items</div><table><thead><tr><th>From</th><th>Date From</th><th>Work Item</th><th>Worked By Activity</th><th>Priority</th><th>Link</th></tr></thead><tbody><tr><td>Kevin Jones</td><td>10/16/2019</td><td>Approval Routing</td><td>Approval Workflow</td><td>2-Medium</td><td>PurchaseOrder_178641_MDJUD_2019-03-26_N.O.BUSINESS_UNIT.MDJUD-PO_ID.0000069164</td></tr><tr><td>Colleen Cantler</td><td>10/17/2019</td><td>Approval Routing</td><td>Approval Workflow</td><td>2-Medium</td><td>PurchaseOrder_178640_MDJUD_2019-03-26_N.O.BUSINESS_UNIT.MDJUD-PO_ID.MTEST6</td></tr><tr><td>Robin Smith</td><td>10/16/2019</td><td>Approval Routing</td><td>Approval Workflow</td><td>2-Medium</td><td>PurchaseOrder_178640_MDJUD_2019-03-26_N.O.BUSINESS_UNIT.MDJUD-PO_ID.MTEST1</td></tr></tbody></table></div></div>	From	Date From	Work Item	Worked By Activity	Priority	Link	Kevin Jones	10/16/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder_178641_MDJUD_2019-03-26_N.O.BUSINESS_UNIT.MDJUD-PO_ID.0000069164	Colleen Cantler	10/17/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder_178640_MDJUD_2019-03-26_N.O.BUSINESS_UNIT.MDJUD-PO_ID.MTEST6	Robin Smith	10/16/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder_178640_MDJUD_2019-03-26_N.O.BUSINESS_UNIT.MDJUD-PO_ID.MTEST1
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4.	<div><div>The PO Approval page displays the transaction that requires your approval including item details such as status, amounts, dates, and line details.</div><div>You can Approve, Hold or Deny the transaction (See the “Workflow Concepts” section for further details).</div><div>Once you take action on the item, it will automatically be removed from your Worklist.</div></div>	<div><div><div>Purchase Order Approval</div><div><div>Business Unit MDJUD</div><div>PO ID 0000069164</div><div>PO Total 5,000.00 USD</div><div>Vendor ID 0000000106 WINNING WORKS LLC</div><div>Buyer KEVIN.JONES</div><div>PO Reference</div></div><div><div>View Printable Version</div><div>View Asset Attributes</div></div><div><div>PO Status Pend Appr</div><div>PO Date 10/16/2019</div><div>Budget Status Not Chkd</div><div>Justification No justification entered by buyer.</div></div></div><div><div>Review Lines</div><div><div>Line Details</div><table><thead><tr><th>Select</th><th>Line</th><th>Item Description</th><th>Quantity</th><th>UOM</th><th>Price</th><th>Merchandise Amount</th><th>Currency</th><th>Original Substituted Item</th><th>Description</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>1</td><td>1</td><td>1.0000</td><td>EA</td><td>5,000.00000</td><td>5,000.00</td><td>USD</td><td></td><td></td></tr></tbody></table></div><div><div>Select All</div><div>Clear All</div><div>View Lines Details</div></div></div><div><div>Review / Edit Approvers</div><div><div>DPCGA POs</div><div><div>Purchase Order 0000069164:Pending</div><div><div>DPCGA PO Approval</div><div><div>Pending</div><div>Multiple Approvers</div><div>Approvers for AM PO's</div></div><div><div>Not Routed</div><div>Multiple Approvers</div><div>DPCGA Approval</div></div></div><div>Comment History</div></div><div><div>Approval Comments</div><div><div>Approve</div><div>Hold</div><div>Deny</div></div><div>Return to Worklist</div></div></div></div></div>	Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency	Original Substituted Item	Description	<input type="checkbox"/>	1	1	1.0000	EA	5,000.00000	5,000.00	USD						
Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency	Original Substituted Item	Description																	
<input type="checkbox"/>	1	1	1.0000	EA	5,000.00000	5,000.00	USD																			
		<table><tr><td>View Printable Version link</td><td>Click this button to view the Purchase Order document (located to the right of the PO ID).</td></tr><tr><td>View Asset Attributes link</td><td>Click this button to View Asset Attributes (located to the right of the ‘View Printable Version’ link).</td></tr><tr><td>Approve</td><td>Click this button to approve the transaction.</td></tr><tr><td>Hold</td><td>Click this button to put the transaction on hold.</td></tr><tr><td>Deny</td><td>Click this button to deny the transaction.</td></tr><tr><td>Approval Comments</td><td>Use this freeform text field to include comments.</td></tr></table>	View Printable Version link	Click this button to view the Purchase Order document (located to the right of the PO ID).	View Asset Attributes link	Click this button to View Asset Attributes (located to the right of the ‘View Printable Version’ link).	Approve	Click this button to approve the transaction.	Hold	Click this button to put the transaction on hold.	Deny	Click this button to deny the transaction.	Approval Comments	Use this freeform text field to include comments.												
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Approval Comments	Use this freeform text field to include comments.																									

4a.

ASSET APPROVER can click the **‘View Printable Version’** link.

Review a PDF version of the PO.

Purchase Order Approval

Business Unit MDJUD

PO ID 0000069164 **View Printable Version** [View Asset Attributes](#)

PO Total 5,000.00 USD

Vendor ID 0000000106 WINNING WORKS LLC

Buyer KEVIN.JONES

PO Reference

PO Status Pend Appr

PO Date 10/16/2019

Budget Status Not Chk'd

Justification

No justification entered by buyer.

4b.

ASSET APPROVER can click the **‘View Asset Attributes’** link (see highlighted) to view the PO’s Asset Attributes by line.

Review/Verify the Asset Attributes contained in the PO. Fields that should be verified specifically for Asset-related POs are as follows:

✓ Asset Type

✓ Asset Class (formerly Category)

✓ Asset Subtype (formerly Sub-category)

✓ Model

✓ Sensitive Asset indicator

Purchase Order Approval

Business Unit MDJUD

PO ID 0000069164 [View Printable Version](#) **View Asset Attributes**

PO Total 5,000.00 USD

Vendor ID 0000000106 WINNING WORKS LLC

Buyer KEVIN.JONES

PO Reference

PO Status Pend Appr

PO Date 10/16/2019

Budget Status Not Chk'd

Justification

No justification entered by buyer.

4c

Clicking the **‘View Asset Attributes’** link will display the following page, labeled **‘Purchase Order Asset Data’**.

AOC AM PO Attributes

Purchase Order Asset Data

Purchase Order

PO Business Unit: MDJUD

PO Number: 0000069164

PO Date: 10/16/2019

Asset Attributes

PO Line	PO Sched.	PO Distr.	Line Qty.	Price	Manufacturer	Model	Profile ID	Asset Type	Asset Class
1	1	1	1	1.0000	5000.00000	Adobe Systems, Inc.	MTTEST3	CARDPRNTR	Card Printer

Same Asset Attribute box, scrolled to the right...

Asset Attributes

	Asset Type	Asset Class	Asset Subtype	Sensitive Asset	Ship To Location	Attention To
1	Card Printer	IT Hardware	PRINTER	CARDPRINTER	N	JIS01



END OF DOCUMENT

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.